

Name

Taxpayer Identification Number

You have indicated that you would like to receive a refund via direct deposit or make a tax payment via electronic funds withdrawal (EFW) from your bank account(s). Note that electronic funds can only be withdrawn from the primary account. Make sure sufficient funds are available in the primary account. Per IRS Security Summit requirements, verify the name of financial institution, routing transit number, account number, and type of account below. If there are any changes please make them on this form. Sign and date at the bottom to indicate upon your review and verification that all account(s) listed are correct and return it to our office.

Primary Account

Name of Financial Institution
Routing Transit Number
Account Number
Type of Account
Joint Account?

Taxpayer Signature

Date

Spouse Signature

Date

The IRS now requires drivers license information to deter identity theft.

Please complete the form below and return with your documents.

Taxpayer

Name _____

Form of Identification Driver's License State Issued ID Card

Identification Number _____

Issue Date (mm/dd/yyyy) _____

Expiration Date (mm/dd/yyyy) _____

State of Issuance _____

Document Number (NY only) _____

Spouse

Name _____

Form of Identification Driver's License State Issued ID Card

Identification Number _____

Issue Date (mm/dd/yyyy) _____

Expiration Date (mm/dd/yyyy) _____

State of Issuance _____

Document Number (NY only) _____